

# CORE Sales Log 2019/20

STRICTLY CONFIDENTIAL (WHEN COMPLETED)

## LOG SIGNATURES / INITIALS

For PRP use only

Purchaser code

DATE OF COMPLETION OF SALE (e.g. 13/04/19)

Day	Month	Year
-----	-------	------

UPRN (Unique Property Reference Number)

Providers should be able to find their UPRN from AddressBase data here:

<https://data.gov.uk/dataset/addressbase>

### PART A: HOUSEHOLD DETAILS

Complete for ALL sales types.

✓ one only

Purchaser(s) should be informed of use and permission sought at interview.

Please note that you should still complete all questions on the sales log even if a purchaser does not have a face to face interview.

Please tick one if applicable:

- Purchaser(s) refused to answer some or all questions in Part A
- Purchaser(s) not interviewed

#### 1. HOUSEHOLD CHARACTERISTICS

Enter all demographic details required for person 1. Enter age, sex, relationship to person 1 and economic status for all other household members. If joint purchaser, enter most economically active purchaser first.

**Establishing demographic information is vital to government and housing stakeholders in understanding who is accessing Affordable Home Ownership.**

	Age	Gender M/F/X/R	Relationship to Purchaser 1	Economic status	Ethnicity	Nationality
Purchaser 1	<input type="text"/>	<input type="text"/>	n/a	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please enter all demographic details required for person 1. Enter age, sex, relationship to person 1 and economic status for all other household members using the codes in the code lists.

Person 2 / Purchaser 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Person 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Person 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Person 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Person 6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

**PLEASE ENTER RELEVANT CODE. PLEASE REFER TO CODE LISTS BELOW \***

Relationship to person 1  
 P = Partner  
 C = Child (eligible for child benefit, under 16, or under 20 if still in full-time education)  
 X = Other

If joint purchasers, enter the most economically active (or oldest if the same) as person 1.

- ❖ **Age** - Enter the age of each household member in years. Use whole numbers for the ages of children. For children aged 0-1 years enter "1" in the box.
- ❖ **Gender** - Enter "M" for male, "F" for female, "X" for other and "R" for refused as defined by the individual.

#### Relationship to Person 1

- ❖ P for the partner (e.g. husband, wife, co-habitee or a partner of the same sex if the couple has entered into a civil partnership).
- ❖ C for dependant children (eligible for child benefit, aged under 16 or under 20 if still in full-time education). **Whilst children are identified by relationship to person 1 due to the different age limits depending on circumstances, there is a validation to check compatible 'child relationship' with age.**
- ❖ X for any other member of the household (e.g. elderly relatives, adult children, lodgers).

#### Economic Status

- ❖ Working full time – working 30 hours or more per week.
- ❖ Working part time – working less than 30 hours per week.
- ❖ Government training/New Deal – on a government training scheme e.g. youth training or is employed within the New Deal Programme **Note:** New Deal, has subsequently been replaced by The Work Programme. For further information please see: <http://www.dwp.gov.uk/docs/the-work-programme.pdf>
- ❖ Job seeker – claiming job seeker's allowance, actively seeking/available for work.
- ❖ Retired – retired fully from work; usually in receipt of a state and/or occupational pension.
- ❖ Not seeking work – those caring for small children or other dependants; those choosing to remain at home and who are therefore not available for work, and would not be registered as unemployed/jobseeker.
- ❖ Full-time student – aged 16 or over and still in full-time education whether at school, college, etc.
- ❖ Unable to work because of long-term sickness or disability.
- ❖ Child under 16 – all members of the household aged under 16.
- ❖ Other adult – other adult aged 16 years or over who does not fit into categories 1 to 8.

**Ethnicity and Nationality:** Whilst this information can often be sensitive please stress the anonymity of the log to seek to collect.

#### CODE LISTS \*

##### Economic status

- |  |  |
|--|--|
| 1 Full time work (30 hrs or more per week)   | 5 Retired  |
| 2 Part-time work (less than 30 hrs per week) | 6 Not seeking work   |
| 3 Government training/ New deal              | 7 Full-time student  |
| 4 Job seeker                                 | 8 Unable to work because of long term sickness or disability |
|  | 9 Child under 16   |
|  | 0 Other adult  |

##### Ethnic Group

- |   |  |                              |
|---|--|------------------------------|
| <b>A. White</b>                                     | <b>C. Asian or Asian British</b>                     | <b>E. Other Ethnic group</b> |
| 1 English, Scottish, Welsh, Northern Irish, British | 8 Indian   | 19 Arab                      |
| 2 Irish   | 9 Pakistani  | 16 Other                     |
| 18 Gypsy, Irish Traveller                           | 10 Bangladeshi                                       |                              |
| 3 Other   | 11 Other   | <b>Refused</b>               |
|   | 15 Chinese   | 17 Refused                   |
| <b>B. Mixed</b>                                     | <b>D. Black, African, Caribbean or Black British</b> |                              |
| 4 White & Black Caribbean                           | 12 Caribbean   |                              |
| 5 White & Black African                             | 13 African   |                              |
| 6 White & Asian                                     | 14 Other   |                              |
| 7 Other   |  |                              |

##### Nationality

- |   |  |   |
|---|--|---|
| 1 UK national resident in UK                    | 10 Slovenia                              | * Other EEA countries are Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, Malta, Netherlands, Portugal, Spain, Sweden, Iceland, Liechtenstein, Norway and Switzerland |
| 2 UK national returning from residence overseas | 14 Bulgaria                              |   |
| 3 Czech Republic                                | 15 Romania                               |   |
| 4 Estonia                                       | 16 Croatia                               |   |
| 5 Hungary                                       | 17 Ireland                               |   |
| 6 Latvia  | 11 Other EU Economic Area (EEA*) country |   |
| 7 Lithuania                                     | 12 Any other country                     |   |
| 8 Poland  | 13 Refused                               |   |
| 9 Slovakia                                      |  |   |

2. **GROSS annual income** (include income from investments and benefits or Universal Credit, but exclude housing benefit and council tax support - to the nearest pound)

If income used for mortgage application

Purchaser 1 £

Purchaser 2 £

Gross annual income: enter a gross annual income for purchaser 1 and 2 if applicable (i.e. salary before tax) plus the annual amount of benefits, Universal Credit or pensions. Weekly amounts to be multiplied by 52.

Income from investments should now be included in the income figure. Where there are more than two incomes in the household only include the incomes of those purchasing the property. Please do not include person 2's income if person 2 is not a joint purchaser.

3. Total savings of purchaser(s) before any deposit is paid

To nearest £10      £

The purchaser(s) should be asked for the total amount of savings they have before any deposit is paid. If the question is refused please leave blank. **If additional money is being given to the purchaser(s) from other sources it should be recorded as part of the total savings of the purchaser(s).** For example, money may be given by other family members who will not be living in the property, or there may be expected equity from the sale of another property.

4. Have any of the purchasers previously owned a property?

Yes  1      No  2      Don't know  3

Tick the "Yes" box if the purchaser or any of the joint purchasers have owned or part-owned a property at any time in the past, even if they do not currently own a property. For example, the purchaser (or one of the joint purchasers) may have jointly owned a home with a former partner. Tick the "No" box if none of the purchasers have owned or part-owned a property before. Tick "Don't know" if you are unsure.

5a. Has the purchaser (or one of the purchasers) ever served in the UK Armed Forces as a regular and...?

Is still serving  4      Left up to and including 2 years ago  5

Left more than 2 years ago  6      Never served  7

Refused  3

**5a. Definition of Regular:** an individual fulfilling a role in the Royal Navy, the Royal Marines, the regular army and the Royal Air Force.

5b. Is the purchaser (or one of the purchasers) the spouse or civil partner of a regular member of the UK Armed Forces who has died in service up to and including 2 years ago?

Yes  1      No  2      Refused  3

6. Previous tenure of person 1

one only

Local authority tenant  1

Private Registered Provider (HA) tenant  2

Private tenant  3

Owner occupier  5

Tied home / renting with job  4

Living with family / friends  6

Temporary accommodation  7

Other  9

Tick the box that describes the previous tenure of Person 1:

- ❖ Local authority tenant – the purchaser was a local authority tenant.
- ❖ Private Registered Provider (HA) tenant – the purchaser was a Private Registered Provider tenant.
- ❖ Private tenant – the purchaser was renting in the private sector.
- ❖ Owner occupier – the purchaser was an owner-occupier.
- ❖ Tied home or renting with job – the purchaser was provided with accommodation by their employer (tied accommodation).
- ❖ Living with family or friends – the purchaser was living with family or friends.
- ❖ Temporary accommodation – the purchaser was living in non-permanent accommodation including non-static mobile homes.
- ❖ Other - the purchaser had any kind of tenure other than the above, or had no tenure and was, for example, sleeping rough.

7. Previous location of person 1

Name of local authority

ONS LA code

Full postcode

If postcode not known tick

Enter the name of the local authority in which person 1 previously lived. Enter the relevant ONS local authority in the boxes provided using the 8 digit code prefixed by E (given in Appendix F of the CORE Manual). **Note:** there are specific codes if the previous location was outside England. You are also required to enter the FULL postcode of the property in which person 1 previously lived. **Please include spaces.** The previous postcode is required for England, Scotland, Wales and Northern Ireland, but not for areas outside of the UK.

8. Which relevant organisation(s) were the purchaser(s) registered with? **Tick ALL that apply**

Your PRP (HA)       Local Authority       Help to Buy Agent       Other PRP (HA)

If any of the purchasers were registered with a local authority, Help to Buy Agent and/or your own or another Private Registered Provider's waiting list/housing register, tick ALL the options that apply. For purchasers who use a housing mobility scheme either "Your PRP", or "Local Authority" should be ticked.

9. Does any household member consider him / herself to have a disability?

Yes  1      No  2      Don't Know  3

Tick the "Yes" box if a member of the household says they have a disability or long-term health condition that has an impact on their day-to-day lives. Tick "No" if no member of the household says they have a disability. Person 1 can answer on behalf of household members not present at the interview.

10. Does any member of the household use a wheelchair?  
 Yes  1 No  2 Don't Know  3

Please tick the "Yes" box if a member of the household uses a wheelchair. If a member of the household only uses a wheelchair outside their home you should still tick the "Yes" box. Tick the "No" box if no member of the household uses a wheelchair. If you are unsure, tick "Don't know".

**PART B: PROPERTY DETAILS TO BE COMPLETED FOR ALL TYPES OF SALES ABOUT THE PROPERTY BEING PURCHASED**

11. Number of bedrooms   
 Enter the number of bedrooms in the property being purchased. For bedsits enter one bedroom.

12. Property type  one only  
 Flat / maisonette  1 House  3 Other  9  
 Bedsit  2 Bungalow  4

Tick the relevant box for flat/maisonette, bedsit, house or bungalow. Tick "Other" for any other kind of property.

13. Building type  one only  
 Purpose built  1  
 Converted from previous residential or non-residential  2

**Purpose built** – if the property was built for its current housing purpose and layout. **Converted** - If the property has been converted into residential use from a non-residential property or has been remodelled to create a different number of units in an existing residential property.

14. Property Location ONS LA code  
 Name of local authority   
 Full postcode

Enter the name of the local authority in which the property is located. Enter the relevant ONS local authority code (an 8 digit code prefixed by E) in the boxes provided using the codes given in Appendix F of the CORE manual. Enter the FULL postcode of the property, with spaces.

15. Is the property built / adapted for wheelchair standards?  
 Yes  1 No  2 Don't know  3

Wheelchair-accessible housing : suitable for someone who uses a wheelchair and offers full use of all its rooms and facilities; designed or converted according to standards set out in the Housing Corporation Design Quality Standards 2007 or the Wheelchair Housing Design Guide.

**PART C – COMPLETE ONLY ONE SECTION – EITHER SECTION 1, 2 OR 3**

**SECTION 1: SHARED OWNERSHIP SCHEMES**

16. TYPE OF SHARED OWNERSHIP SALE  one only  
 Shared Ownership  2  
 Older Persons Shared Ownership  24  
 Social HomeBuy (shared ownership purchase)  18  
 Home Ownership for people with Long Term Disabilities (HOLD)  16  
 Rent to Buy – Shared Ownership  28

The purchaser buys up to 75% of the property value and pays rent to the Private Registered Provider shared owner on the remaining portion. There are variations on the basic shared ownership: Social HomeBuy on shared ownership terms, Older Persons Shared Ownership, Home Ownership for people with Long Term Disabilities (HOLD). Rent to Buy are lettings provided at intermediate rent for a period of between 6 months and 5 years. During or after that rental period, if the property is sold on shared ownership terms it should be captured here

17. Is this a resale? Yes  1 No  2

If the social landlord has previously sold the property to another purchaser and is now reselling the property tick "Yes" and code as the original sale type in Q16. If this is the first time the property has been sold tick "No".

18. Key Dates LEAVE KEY DATES BLANK FOR RESALES  
 Day Month Year  
 Practical completion / handover date   
 Exchange of contracts date

**Practical completion/handover date** – the date on which the building contractor hands over responsibility for the completed property to the PRP.  
**Exchange of contracts date** – the date on which the sale becomes legally binding with an exchange of signed contracts between the vendor and the buyer. Where properties are sold "off plan", that is, while the property is still being built, the exchange of contracts date may precede practical completion/handover.

19. Was the household rehoused under an LA Nominations Agreement?  
 Yes  1 No  2 Don't know  3

A local authority Nominations Agreement is a written agreement between a LA and PRP that a proportion or all of its sales vacancies are offered to LAs to nominate applicants for rehousing.

**IF THE PURCHASER WAS AN RP (HA / LA) TENANT GIVE DETAILS OF PROPERTY BEING VACATED (QUESTIONS 20 & 21)**

20. Number of bedrooms   
 Enter the number of bedrooms of the property being vacated. For bedsits enter one bedroom.

21. Property type  one only  
 Flat / maisonette  1 House  3 Other  9  
 Bedsit  2 Bungalow  4

Tick the relevant box for the property being vacated: flat/maisonette, bedsit, house or bungalow. Tick "Other" for any other kind of property.

22. Full Purchase Price (market value before any discount) £   
 Enter the full purchase price (market value before any discount) of the property before any discounts are applied. For shared ownership, enter the full purchase price paid for 100% equity – this is equal to the value of the share owned by the PRP plus the value bought by the purchaser.

23. Initial % equity stake purchased  %  
 Enter the amount of initial equity held by the purchaser e.g. 25%, 50%.

24. Amount of mortgage £   
 Enter the amount of the mortgage the purchaser has agreed with the mortgage lender, excluding any deposits or other cash payments. Enter the name of the lender from the dropdown list.

24a. Name of mortgage lender

The mortgage (Q24) plus deposit (Q26) should equal the equity stake purchased which is calculated as value (Q22) multiplied by equity stake percentage (Q23/100). You will be queried when submitting online if not. Issues may arise because;

- a field is wrongly left blank,
- fields use incorrect units (e.g. £ instead of £'000s),
- the equity stake percentage is inputted as the stake held by the landlord rather than the initial equity stake purchased (as should be).

<p>25. Does this include any extra borrowing?  Yes <input type="checkbox"/> 1      No <input type="checkbox"/> 2      Don't know <input type="checkbox"/> 3</p>	<p>If the mortgage includes borrowing beyond the purchase price of the property tick the 'Yes' box, if not tick the 'No' box.</p>
<p>25. Does this include any extra borrowing?  Yes <input type="checkbox"/> 1      No <input type="checkbox"/> 2      Don't know <input type="checkbox"/> 3</p>	<p>If the mortgage includes borrowing beyond the purchase price of the property tick the 'Yes' box, if not tick the 'No' box.</p>
<p>26. Cash deposit paid on property (full cash amount paid by purchaser)      £ <input style="width:100px;" type="text"/></p>	<p>Enter the total cash sum paid by the purchaser towards the property that was not funded by the mortgage i.e. the difference between the cost of the equity stake purchased and the mortgage.</p>
<p>27. Cash amount of discount given for Social HomeBuy      £ <input style="width:100px;" type="text"/></p>	<p>Enter the total cash discount given on the property being purchased via the Social HomeBuy scheme.</p>
<p><b>MONTHLY HOUSING COSTS</b> (Excluding mortgage payments)</p> <p>28. Basic monthly rent (rent element only)      £ <input style="width:100px;" type="text"/></p> <p>29. Monthly charges (include service charges, management charges, exclude rent)      £ <input style="width:100px;" type="text"/></p>	<p><b>Q28</b> - Enter Basic monthly rent. <b>Q29</b> - Enter any monthly charges payable on leasehold or shared ownership sales. Include service charges and management charges which may cover: day-to-day repairs , transfers to a cyclical maintenance fund, building insurance , cleaning, gardening and lighting (communal areas), audit fees, wardens/scheme managers . Exclude rent.</p>
<p><b>SECTION 2: FULL OWNERSHIP SCHEMES</b></p>	
<p>30. TYPE OF SALE</p> <p style="text-align: right;">✓ one only</p> <p>Right to Acquire (RTA) <input type="checkbox"/> 8</p> <p>Preserved Right to Buy (PRTB) <input type="checkbox"/> 14</p> <p>Voluntary Right to Buy (VRTB) <input type="checkbox"/> 27</p> <p>Right to Buy (RTB) <input type="checkbox"/> 9</p> <p>Rent to Buy – Full ownership <input type="checkbox"/> 29</p> <p>Social HomeBuy for outright purchase <input type="checkbox"/> 21</p> <p>Any other Equity loan scheme <input type="checkbox"/> 22</p>	<p><b>RTA, RTB, PRTB, VRTB:</b> Sitting tenants are offered a discount on the value of the property they purchase.</p> <p><b>Social HomeBuy (for outright purchase):</b> This is an Affordable Home shared ownership scheme which is available only to sitting tenants, who may buy their home outright based on the local Right to Acquire Discount.</p> <p><b>Equity loan schemes:</b> The purchaser buys a proportion of the property and obtains a loan from the PRP to fund the remaining portion.</p> <p><b>Rent to Buy:</b> are lettings provided at intermediate rent for a period of between 6 months and 5 years. During or after that rental period, if the property is sold on full ownership terms it should be captured here.</p>
<p>31. Full purchase price (market value before any discount)      £ <input style="width:100px;" type="text"/></p>	<p>Enter the full purchase price (market value before any discount) of the property before any loans, grants, discounts or subsidies are applied. For RTB or PRTB sales, enter the full price of the property without any percentage discount.</p>
<p>32. Loan / grant / discount / subsidy given (all schemes except RTB, PRTB , VRTB and Rent to Buy)      £ <input style="width:100px;" type="text"/></p>	<p>Enter the amount of loan, grant, discount or subsidy given on the property being purchased.</p>
<p>33. Enter % discount given (RTB, PRTB &amp; VRTB) (if discount capped, enter capped %)      <input style="width:100px;" type="text"/> %</p>	<p>If the property is being sold to an existing tenant under the RTB or PRTB, enter the percentage discount from the full market value that is being given. For sales where the discount is capped, the capped amount should be entered. For example, if the purchaser is entitled to a 50% discount but the discount is capped at 35%, the discount to be entered is 35%.</p>
<p>34. Amount of mortgage      £ <input style="width:100px;" type="text"/></p> <p>34a. Name of mortgage lender <input style="width:200px;" type="text"/></p> <p style="border: 1px solid black; padding: 5px; margin-top: 10px;">If "Other" please enter name here:</p>	<p>Enter the amount of the mortgage the purchaser has agreed with the mortgage lender, excluding any deposits or other cash payments. For HomeBuy do not include any equity or interest free loans. Enter the name of the lender from the dropdown list.</p> <p style="color: red; font-weight: bold; margin-top: 10px;">The mortgage (Q34) plus deposit (Q36) plus grant (Q32) should equal the purchase price minus the discount which is calculated by multiplying the value (Q31) by the inverse of the discount percent (1-(Q33/100)). You will be queried when submitting online if not. Issues may arise because;</p> <ul style="list-style-type: none"> <li>a field is wrongly left blank,</li> <li>fields use incorrect units (e.g. £ instead of £'000s),</li> <li>the discount percentage is input as the proportion the purchaser is buying rather than the discount given (as it should be).</li> </ul>
<p>35. Does this include any extra borrowing?  Yes <input type="checkbox"/> 1      No <input type="checkbox"/> 2      Don't know <input type="checkbox"/> 3</p>	<p>Enter the total cash sum paid by the purchaser towards the property that was not funded by the mortgage, that is, the difference between the cost of the property (after any loan or discount has been applied) and the mortgage.</p>
<p>36. Cash deposit paid on property (exclude any grant or loan)      £ <input style="width:100px;" type="text"/></p>	<p>Enter the total cash sum paid by the purchaser towards the property that was not funded by the mortgage, that is, the difference between the cost of the property (after any loan or discount has been applied) and the mortgage.</p>
<p>37. Monthly charges (where applicable i.e. leasehold, include service and management charges)      £ <input style="width:100px;" type="text"/></p>	<p>Enter any monthly charges payable on leasehold sales. The figure should include service charges and management charges (see Question 29 for more details).</p>

**SECTION 3: OUTRIGHT SALES / OTHER SALES**

38. TYPE OF SALE  one only

Outright sales (New build or converted)  10

Other sale  12

If Other sale please enter type of scheme:

Note: There is no Q39

Please **do not** record Right to Acquire (RTA), Right to Buy (RTB), Preserved Right to Buy (PRTB) or Rent to Buy sales in this section as they should be recorded in Question 30. Properties that were previously Rent to Buy but were not purchased at the end of the agreement and subsequently sold on the open market should be recoded as Other sale and type of scheme as "previously Rent to Buy"

**Outright Sales:** where the property is sold outright. Please do not record non-social use disposals or auctions as Outright Sales; disposals and auctions should not be recorded as CORE only records sales to qualifying households as Affordable Home Ownership Schemes.

**Other Sales:** any other social sale of property which does not fall into specified categories in Sections 1 & 2 of the log

40. Full purchase price (market value before any discount) £

Enter the full purchase price, the market value of the property before any discounts are applied.

41. Amount of mortgage £

Enter the amount of the mortgage the purchaser has agreed with the mortgage lender, excluding any deposits or other cash payments. Enter the name of the lender from the dropdown list.

41a. Name of mortgage lender

If "Other" please enter name here:

The mortgage (Q40) plus deposit (Q42) should equal the purchase price (Q39). You will be queried when submitting online if not. Issues may arise because;

- a field is wrongly left blank,
- fields use incorrect units (e.g. £ instead of £'000s).

42. Does this include any extra borrowing?  
Yes  1 No  2 Don't know  3

If the mortgage includes borrowing beyond the purchase price of the property tick the "Yes" box, if not tick the "No" box. Additional borrowing would include money for home improvements.

43. Cash deposit paid on property (Full cash amount paid by purchaser) £

Enter the total cash sum paid by the purchaser towards the property that was not funded by the mortgage, that is, the difference between the cost of the property (after any discount has been applied) and the mortgage.

44. Monthly charges (where applicable i.e. leasehold, include service and management charges) £

Enter any monthly charges payable on leasehold sales. The figure should include service charges and management charges.